

Strategies for Scale

**Learning from Two
Educational Innovations**

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This is the sixth paper in a series dedicated to understanding innovation in public problem solving. Since 1986, the Ford Foundation has supported the Innovations in American Government Program at Harvard University's John F. Kennedy School of Government. Housed in the Taubman Center for State and Local Government, the Innovations Program administers the annual Innovations Awards competition, which selects ten winners from approximately 1500 applications each year, and supports research and casewriting based on the applicants and winners. The Innovations in American Government Program also works in partnership with the Council for Excellence in Government.

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Introduction

As it passes the fifteen-year mark of recognizing exemplary government programs, the Innovations in American Government Program has as a major goal to identify more robust and systemic reforms in education. Although the Program has identified a number of influential efforts early in their designs, there has been a paucity of education winners relative to the extent of the need and the number of local, state, and federal initiatives in the past fifteen years. One reason for this shortfall is that the four criteria for Innovations Program evaluation--novelty, significance, effectiveness, and replicability--while appropriate for evaluating a wide range of government programs, have caused myriad problems when school programs are on the table. Richard F. Elmore examined this problem in an essay commissioned by the Innovations Program in 1997 entitled "The Paradox of Innovation in Education." Elmore wrote, "In instructional practice, education has a tradition of cottage industry innovation. Individual practitioners and researchers develop new practices, often based on sophisticated, empirically grounded ideas, and test them in selected settings. This form of innovation dates at least from the early decades of the twentieth century when John Dewey demonstrated that inquiry and practice could be connected in powerful ways. These cottage industry innovations in instructional practice seldom apply to schools other than the ones in which they are developed and tested, and, if they do, they are often adopted in an eviscerated, watered-down form that bears little resemblance to the original."

Nevertheless, educators continue to try, and in trying, often succeed, though in limited settings and for limited durations. Strong efforts also continue to emerge from universities and from schools themselves, and a handful of them have had significant success in recent years in achieving scale. And as Innovations evaluators have noted year after year, at the intersection of innovation and replicability, the ability to scale up programs is vital.

*In this paper, Bryan Hassel, the director of Public Impact, an education policy and consulting firm, and author of **The Charter School Challenge: Avoiding the Pitfalls, Fulfilling the Promise** (Brookings, 1999), and Lucy Steiner, a former classroom teacher who conducts research widely on education reform, examine two intriguing programs, Success for All and the Accelerated Schools Program, each of which has been adopted by more than 1,000 schools nationwide. Although the nation's public schools number more than 80,000, reaching 1,000 schools with a fairly comprehensive reform program is an impressive feat in light of the lackluster history of such efforts. The spread of such comprehensive school designs as these two has even caught the attention of the U.S. Congress, which in 1997 created the Comprehensive School Reform Demonstration Program to provide funding for schools adopting research-based school designs. Enthusiasm for these designs must be tempered, nonetheless, by a widescale, though not universal, lack of evidence supporting their efficacy at improving student learning. One recent survey of the research found that only a small number of comprehensive reforms (Success for All among them) could boast convincing evidence of their educational effectiveness (American Institutes for Research, 1999).*

Still, because of the relative success of these programs at scaling up, focusing some attention on the strategies that their promoters have used in taking them to scale might prove informative and useful for subsequent efforts to scale up good practice. This paper is aimed at educational "entrepreneurs" who have devised good ideas and now want to take them to scale. The perspective of the entrepreneurs, though, provides a useful window on the problem because these are the individuals and organizations who are the most motivated to find solutions to the problems of scaling up. They have something to "sell"; their very success and survival may depend upon achieving scale. And so they are likely to devise strategies to overcome some of the barriers that the literature has long found present in the educational system. By examining these strategies and how they have worked (or have not worked), we should be able to learn something useful about scaling up good ideas in education, and, perhaps, beyond.

Strategies for Scale

Learning from Two Educational Innovations

The field of education is rich with examples of good ideas that were never adopted on a large scale. The difficulties seem even more daunting when reformers attempt to transform what Richard Elmore refers to as the “core” of schooling: what actually happens in classrooms between teachers and students (Elmore, 1996). What makes this type of innovation so difficult? Why are there so many studies citing failed attempts to induce teachers to adopt new practices?

This paper looks at two programs, *Success for All* and *Accelerated Schools*, each of which has been adopted by over 1,000 schools in the past decade. Following brief descriptions of the two programs, this paper identifies through the literature on school innovation a pair of management dilemmas that education reformers must navigate if they seek to scale up new ideas. It concludes by discussing the two programs in light of the ways these initiatives have and have not been able to resolve the dilemmas confronting entrepreneurs seeking to scale up good educational ideas.

SUCCESS FOR ALL: FOCUS ON READING

The founder of *Success for All*, Robert Slavin, believes that school failure is attributable largely to early failure in reading. Poor reading, he believes, leads to retention, low self-esteem, lack of motivation, and special education placement. *Success for All* was developed as a collaboration between the Center for Research on Effective Schooling for Disadvantaged Students at Johns Hopkins University and the Baltimore City Public Schools. It has been led by Slavin and his wife, Nancy Madden. The name, *Success for All*, refers to

the program’s promise that reading failure is preventable for nearly all children if they are provided with a research-based curriculum, family support services, and one-on-one tutoring as needed. *Success for All* prescribes what day-to-day materials, lessons, and instructional methods teachers should adopt. The day-to-day activities of the teachers are carefully prescribed.

The Success for All Curriculum. Students at *Success for All* (SFA) schools generally attend a half-day preschool with an emphasis on language skills, school readiness, and a positive self-concept. A full-day kindergarten continues emphasis on language, using children’s literature and thematically related activities.

In daily 90-minute reading periods, SFA schools group students by reading level (not grade level) into small groups to increase time devoted to direct instruction. In kindergarten and first grade, SFA schools emphasize language skills development, auditory discrimination, and sound blending. For grades two through five, students use school-selected materials, basal readers, and trade books. At this level, teachers use partner reading, exercises in identifying characters, settings, and problem solutions of narratives, summarizing, writing, and direct instruction in reading comprehension skills. They also use some cooperative learning strategies that are based on the Cooperative Integrated Reading and Composition (CIRC) program.

Teaching, Assessment, and Management. Students are assessed every eight weeks to determine if they are making progress in reading. Schools use this information to assign students to tutoring, to make changes in reading group

placement, to initiate family support intervention, or to devise other means of meeting the needs of students. Based on evidence that one-on-one tutoring provides the most effective instruction, teachers work individually with students in grades one through three who are not yet at grade level in reading, giving priority to first grade students.

A family support team promotes family involvement, meets the needs of individual students, implements attendance plans, and integrates resources. The team might include the principal or vice-principal, a facilitator, and a social worker. Some may provide services like counseling, food pantries, and nurses at the school.

In terms of management, one change from the norm is the key roles played by a facilitator. The facilitator is usually a well-respected faculty member with responsibility for implementing *SFA* at the school. She trains new faculty, monitors progress, and generally keeps the program moving. In addition, an advisory committee of the principal, the facilitator, teacher representatives, a social worker, and the *SFA* trainer (when available) meets weekly to review progress.

History and Evaluation. *Success for All* was first implemented in a single elementary school in Baltimore in 1987. The following year, it expanded to six schools (five in Baltimore and one in Philadelphia). Since then the program has taken off, with more than 1,500 schools in 47 states using it for the 1999-2000 school year.

Its spread is a product of the attractiveness of the core idea, key partnerships, and a dynamic production and adaptation of new curriculum products. *SFA* has benefited from its involvement with New American Schools, which promotes the program as one of a handful of recommended designs for school improvement. It has developed an extension of the program called Roots and Wings, which includes a mathematics component, Math Wings, and an integrated science, social studies, and writing component called WorldLab. Both programs rely on similar strategies, such as thematic units, direct instruction, simulations, and social skills reinforcement.

According to *An Educators' Guide to Schoolwide Reform*, the research supporting *Success for All* is strong. The *Guide* cites 15 empirical studies that offer evidence of

positive effects on student achievement. In general, assessments indicate substantial improvement in test scores, especially for those students who are in the lowest quarter of their grades. Retention and special education placement are also significantly lower. There are greater effects in the second year, so program effectiveness appears to increase over time (American Institutes for Research, 1999).

ACCELERATED SCHOOLS: CHALLENGING CURRICULUM AND PROGRESSIVE VALUES

Henry Levin, an economist, focused much of his early research on community control of schools, democratic schools as an agent for social change, and the relationship between school and social inequalities. As Levin became interested in educationally disadvantaged students, he reviewed research, visited schools, and conducted numerous interviews with teachers and students (Levin, 1998). More often than not, he found dedicated teachers teaching low-level basic skills through repetition. He concluded that this practice not only caused students to fall further and further behind, but also affected their expectations and self-esteem. Many students appeared to see themselves as "broken." The exciting work that Levin did find took place in "gifted and talented" classrooms where students excelled. Therefore, he reasoned that rather than provide continuous remediation for students who are behind, schools need to "accelerate" them with a rich and challenging curriculum to enable them to catch up to their peers (Levin, 1998). From his base at Stanford University, he launched the *Accelerated Schools Project (ASP)* to promote the creation of schools in which all students would be performing at or above grade level by the time they left school.

His belief that disadvantaged students should be required to master challenging work led Levin to establish a set of values that became the foundation of accelerated practices. Based in part on the ideas of John Dewey, these beliefs and attitudes include equity, participation, communication, collaboration, community, reflection, experimentation, trust, risk-taking, and seeing the school as the center of expertise. Dewey's philosophy, which has become that of *Accelerated Schools* as well, is that a democratic education involves faith in the potential of both children and adults to

understand and shape the world around them. This constructivist approach holds all members of the school community responsible for setting goals and assessing success, which means that students and staff members are viewed as authors of the educative process rather than as recipients.

Curriculum and Philosophy. In presenting these ideas to a broad audience, *Accelerated Schools* developers refer to three principles. The first is “unity of purpose,” whereby school personnel, parents, and students all work toward the goal of educating all students. The second is “empowerment with responsibility,” which requires that all school members participate in decisions about materials, curriculum, and instruction. And the third is “building on strength,” which treats all students as gifted and talented and does away with ability grouping.

In addition to these three principles, *Accelerated Schools* differs from *Success for All* in the responsibility given to teachers and school teams. The *ASP* approach is not to prescribe specifics about what should happen in the classroom, but rather to collaborate in planning and assessment with school staff over a period of several years so that they become committed to a process of ongoing improvement. According to *ASP*, change arises from two vital processes: inquiry and reflection. As teachers begin to change their beliefs and practices, these processes are what propel them forward and give them confidence. These skills are presented in training, are built into the structure of the change process itself, and are expected to be the foundation for changes that occur in classroom instruction as well.

Although *ASP* allows school personnel to make choices about instructional materials and methods, it asks the schools to focus on creating “powerful learning” situations in which students can see meaning in their lessons. Rather than leaving it completely up to the schools to interpret for themselves what this means, *ASP* provides training on specific instructional practices that support this type of learning, including shared inquiry, problem solving, the use of manipulatives, cooperative learning, cross-age tutoring, and an absence of tracking. In addition, *ASP* suggests other practices borrowed from gifted and talented curriculums such as emphasizing language skills across disciplines, problem

solving, and higher order thinking skills. Because *ASP* presents this host of potential practices, Levin argues that schools are unlikely to adopt traditional instructional strategies.

Teaching, Assessment, and Management. Once a school adopts the program and training has begun, the process at the school begins by *taking stock*. Committees gather to analyze data and then write a school-wide report. Taking stock also serves the purpose of fostering good working relationships. Next, groups work on *forging a vision* of their dream school, compare this with baseline data, and set priorities for change. At this point, the school reorganizes into a new governance structure. Most staff, in groups of three to five, then self-select into “cadres,” which focus on curriculum, school organization, and parent involvement (Hopfenberg & Levin, 1993).

In addition, a steering committee made up of parents, teachers, support staff, and the principal guides the process and eventually presents its findings to the school as a whole to make all decisions. Cadres meet weekly, the steering committee bi-weekly, and the school as a whole on an as-needed basis. The entire school is trained in group dynamics, management, and problem solving. Cadres define challenges, test out hypotheses about reasons for problems, and brainstorm for solutions by searching inside and outside the school. Trainers encourage teachers to design plans that have a “disconfirmable” hypothesis: one that can be proven wrong or in need of transformation. All action plans must have built-in assessment, the results of which allow for modification.

Because *ASP* questions the value of standardized testing, its developers have tried to help schools rethink assessment in creative ways. They believe assessment should include an evaluation of decision-making and governance processes, the implementation of decisions from that process, and the outcomes of the process (Levin, 1998).

History and Evaluation. To pilot his new project, Levin located two elementary schools in San Francisco with a large number of students living in poverty and recruited graduate students familiar with accelerated practices to work intensively with the staff. He made it clear that the schools would need to make a five-year commitment to the project,

and they voted unanimously to do so. This first version of the program taught the developers some difficult lessons: progress was extremely slow, many teachers preferred cosmetic changes, and addressing tension and conflict was unavoidable and messy. Despite these challenges, Levin's Stanford team was encouraged that children formerly relegated to remedial classes were doing advanced work (Finnan, St. John, McCarthy, & Slovacek, 1995).

Interestingly, Levin's program was first noticed by state education officials responsible for at-risk youth and Title I programs, led by Missouri and Illinois. Missouri chose to launch five *Accelerated Schools* in 1988 and Illinois 25, even though the Stanford staff was concerned that they did not have the personnel to train and support that many schools (Levin, 1998). By 1989, the Stanford team had decided it needed a systematic plan for expansion. In 1990, they launched their first middle school, opened four regional "satellite centers" to provide schools with training and technical assistance, and developed training workshops for school coaches and teams.

By the 1991-1992 school year, demand for *ASP* services was so high the Stanford group was unable to train all interested schools. Like *SFA*, *ASP* counted more than 1,000 schools in 1998-1999, with hundreds more expected to join within the next two years. In addition to the center at Stanford, there were 12 satellite centers across the country based in state departments of education and universities.

According to *An Educators' Guide to Schoolwide Reform*, research on the effectiveness of *Accelerated Schools* is marginal. Only two studies were considered sufficiently rigorous to be included, although the Manpower Demonstration Research Corporation is currently conducting a large independent study that focuses on achievement. Of the two studies, one reported strong gains, and the other reported mixed results (American Institutes for Research, 1999). In non-comparison studies, *ASP* itself cites numerous examples of schools that have experienced test score gains over time. For example, the State of Missouri funded a 1992 evaluation of six initial *Accelerated Schools*, which showed that all six had made gains in student achievement since 1988, which led to state-wide expansion of the *Accelerated Schools Project*.

In a 1996 evaluation conducted by the Louisiana *Accelerated Schools Project*, 64% of the participating schools showed positive gains in the percentage of students meeting the standards of the math and reading achievement tests (*Accelerated Schools Project* [on-line]).

THE DILEMMAS OF SCALING UP: LESSONS FROM THE LITERATURE

Both *Success for All* and *Accelerated Schools* have expanded dramatically since their inception, in part because of their success at navigating a pair of dilemmas that have snagged previous generations of school innovators seeking to scale up their ideas. The first dilemma has to do with what it takes internally to induce sustained change in school practices. The second dilemma has to do with managing external forces.

The Internal Commitment Core Dilemma. Changing instructional practices, Elmore's core, requires a deep level of commitment from teachers, many of whom may be jaded by past experience. They have seen too many reforms come and go when district or public interest wanes, money runs out, or there is turnover and burnout among reformers (Tyack and Tobin, 1993). In addition, the risks that they are asked to take can be daunting. Reformers often ask teachers to rewrite lesson plans, rethink their methodology, and try new approaches to classroom management. If teachers do not agree with the philosophy behind the reform, do not believe that it is an improvement, or do not feel they will receive adequate support in their attempts, the temptation to ignore the reform — to shut the door and go on doing what they have always done — may overwhelm even the most well-intentioned (Huberman and Miles, 1984).

Teachers can respond this way because of what Tyack and Tobin (1993) refer to as the "grammar" of schooling: the rules and structures that govern the work of instruction. As Odden (1991) reports, it is these structures that allow teachers to have ultimate control over practice when they enter the classroom. Organizational scholars often refer to schools as "loosely coupled systems," in which overseers wield only indirect control over the "technical core" of the operation (e.g., Meyer and Rowan, 1978; Weick, 1976).

There has been significant research and debate on whether deep commitment from teachers, which leads to needed culture change, is better achieved by giving teachers the power to develop their own instructional means, toward a fixed end and within an acceptable philosophy, which is the strategy behind *ASP*, or by prescribing in detail what teachers should do, which is the *SFA* approach. But without culture change, one part of the literature argues, no substantive change at the core can take place. Teachers, unconvinced of the value of change, will go on teaching the way they always have. Hence, it is vital to involve teachers in the creation of new approaches, changing the very culture of the school through collaborative decision making.

Other researchers, however, have argued that an emphasis on the processes of building commitment, collaborative decision-making, and the like may well change the surface structures of schooling without inducing any substantive change at the core. According to Elmore (1996), it is possible to imagine a situation where school personnel focus on all sorts of culture-change by having weekly meetings, producing reports, and changing job titles, but continue to do the same thing in the classroom. "It is possible," he suggests, "even imperative, for institutions to learn to change massively in their surface structures while at the same time changing little at their core." He cites both the progressive movement in schooling and the numerous National Science Foundation curriculum initiatives as examples of massive efforts to change instruction which had little permanent effect. Cuban's (1992) look at the history of junior high schools produced similar findings. Early reformers hoped to provide young adolescents with instructional practices uniquely suited to their age, but these cultural reforms lost ground until junior high schools became indistinguishable structurally from high schools.

So would-be educational entrepreneurs face a dilemma. If they attempt to foist their ideas on teachers without first creating the will and capacity to change, they may find teachers closing their doors and returning to their well-established habits. But if they focus resources solely on changing the structures by which school practices are created and implemented in schools, they may find themselves with a

great deal of surface change that has little connection to underlying classroom realities.

The External Factors Dilemma. A second dilemma that emerges from the literature concerns the relationship between the school and its environment. Public schools do not exist in a vacuum. They are generally part of school districts; they live with the constraints of state and national policies; the people who work in them are part of broader professional communities that impart their own norms through educational and associational activities. A great deal of research suggests that as a result, it is very difficult to change school practice without changing this broader environment within which schools work. For example, Bodilly and her colleagues report that after the initial demonstration phase, *New American Schools (NAS)* became convinced that its models would not become permanent unless they could create a more supportive local environment to sustain them. For this reason, *NAS* announced that it would narrow its focus and work closely with only a few jurisdictions to transform at least 30 percent of their schools within five years. *NAS* officials came to this conclusion after examining the data from the first two years and determining that many of the factors that influenced implementation were external to the school. District-level factors such as stable leadership, an absence of political turmoil, school-level autonomy, and adequate funding and support all positively influenced the level of implementation of *NAS* designs (Bodilly et al., 1998).

These findings are seconded elsewhere. Cox (1983) concludes that central office staff play a crucial role in securing approval, resources, facilities, and personnel to support improvement efforts. Chubb and Moe (1990) argue that school-level change is difficult because of the political environment within which schools function and the endless web of rules and regulations that enmesh school personnel. Cuban (1984) describes the difficulty of assembling a supportive staff because of restrictive hiring and transfer policies. Schaffer, Nesslerodt, and Stringfield (1997) point to the need for stable funding by describing schools that move from reform to reform, abandoning each one after funding runs out.

For Elmore (1996), other key elements of the environment include the professional norms of the teaching pro-

fession that do not encourage the behaviors associated with innovative practice. One example is the broad professional norm that good teaching is a trait rather than a set of “learned professional capacities.” The Cohen survey (1994) provides empirical data to support this concern. Some 77 percent of the elementary teachers surveyed agreed that personality characteristics of the teacher were more important for success in teaching than any professional skill the teacher might possess (Meyer & Rowan, 1978). In order to combat the idea that good teaching cannot be taught, Elmore (1996) suggests strengthening external normative structures that encourage teacher professionalism, such as university partnerships and professional organizations.

So to foster real, lasting change in schools, innovators need to focus some attention on the broader environment within which schools work: their school districts, the larger polities within which they exist, and the systems of professional norms that teachers and administrators bring with them to school. But doing so is likely to prove extraordinarily difficult for reformers, requiring years of relationship-building and perhaps political advocacy. And a focus on such external structures risks lapsing into the same kind of ceremonial change that has too often typified education reform in the United States, leaving the core untouched.

To take good ideas to scale in American education, entrepreneurs need to manage this pair of strategic dilemmas. The next two sections describe the efforts of two prominent engines of educational innovation to do so.

CONFRONTING THE DILEMMAS

How have *Success for All* and the *Accelerated Schools Program* confronted the two dilemmas outlined in the first section of the paper? This section of the paper will address that question based on two sources of information. First, there is extensive published literature on the programs, as well as numerous monographs and other unpublished material. While most of this literature addresses the substance of the programs rather than their scale-up strategies, increasing attention has been paid to the ways in which the founders of the programs are attempting to spread their ideas. Second, the authors conducted interviews with several key individuals

involved at a strategic level with these two designs, including the founders of the designs, top strategists in the national offices, and individuals in leadership positions somewhat closer to the “action,” such as directors of regional satellite centers that *Accelerated Schools* has established. The authors focused the interviews on the scaling-up strategies each program has developed and the lessons they have learned as they have grown.

Confronting the Internal Commitment-Core Dilemma. A central challenge of reformers is to build commitment among administrators and teachers to implement change. According to one strand of the literature, simply walking into a school with a prepackaged approach will not generate commitment. Instead, commitment grows out of ownership, the participation by school-level staff in crafting change, or at least adapting a reform to local circumstances. Creating ownership requires process: meetings, discussions, new organizational structures, planning, and evaluation. The dilemma facing reformers, as Elmore points out, is that a school can put all that process into place and leave the core essentially unchanged. Meetings happen, structures evolve, plans are written, but instruction carries on as before.

On the surface, the two models examined here could not be more different in their approaches to this dilemma. The *Accelerated Schools* model is more “facilitative”: it introduces a philosophy and process of change that encourages teachers to take ownership of student learning (Finnan, 1996). In this way, it seems to take a page directly from the ownership-oriented literature on school change, focusing primarily on changing school “culture” in the hope that changes in the core will result. In terms of the commitment-building dilemma, *ASP* appears at risk of changing surface structures while the core stays intact.

By contrast, *Success for All* appears more focused on the core of learning. It is a prescriptive program in which teachers are trained to teach a 90-minute reading period, which is scripted and uniform across all *Success for All* schools (Slavin & Madden, 1996). Neither individual teachers nor the collective staff takes part in determining what *Success for All* looks like at a school site. Like many reforms that have preceded it, *Success for All* appears vulnerable to

the pitfall of attempting to induce schools to make changes that the staff has not had a hand in developing.

What emerges from interviews with both practitioners and program developers is more complex. Although the programs seem to approach building commitment from opposite standpoints, there are sub-themes at work within each program. Within *ASP*, there is work being done to ensure the core is affected as well as school culture, and within *SFA*, there are attempts to make school culture more conducive to core changes. In fact, both programs appear to be pursuing four broadly similar strategies to manage this dilemma: obtaining initial buy-in, providing support, fostering leadership, and ensuring quality control.

Obtaining Initial Buy-in. In many of the empirical studies of failed efforts to scale up educational innovations, schools did not come to the reform process voluntarily. They were required to participate by some higher authority, such as the school district. Reformers faced the challenge of building commitment for the reform during the implementation process. Recognizing the difficulties in doing so, both of these programs (and many other school designs) focus a great deal of energy on ensuring that schools that pursue the model “buy in” up front. They attempt to implement their designs only in schools where the staffs are overwhelmingly supportive of the program’s approach. The buy-in process for those interested in both programs is similar; *ASP*’s “courtship phase” typically takes two to three months, while joining *SFA* can take six months or more. Both programs encourage schools to examine the program’s web site, provide schools with an information packet and a video, arrange visits to existing schools when possible, have a regional trainer or satellite center staff member visit the school for an awareness presentation, and then require the support of at least 80% of the teachers and staff in a secret ballot (*Accelerated Schools Project* [on-line]; *Success for All Foundation* [on-line]).

Both developers stress the importance of being as clear as possible, during buy-in, about the process, the changes school personnel will have to make, and the difficulty of implementing this type of comprehensive reform. Both say that the more candid they are initially, the fewer problems they have with commitment later. In the case of *SFA*, where

teachers adopt a prescribed curriculum, this initial stage is especially important; it is when teachers have the most input over the school’s direction. Once they adopt *SFA*, schools have little say over the shape it takes. By being straightforward about what will happen, *SFA* attempts to ward off later criticism from teachers wanting more scope for creativity. In the case of *Accelerated Schools*, teachers and parents have a much greater role in designing the school’s ultimate program. Still, *ASP* regards buy-in to the *ASP* philosophy and process as critical.

Both programs want schools to choose their models voluntarily, but they expend considerable effort marketing the virtues of their approaches. While both programs cite evidence of student achievement gains when making their case to prospective schools, the track record of the design appears to play a larger role in the marketing effort of *Success for All* than in that of *Accelerated Schools*. The most basic message of *Success for All* is that its program has been proven to work in rigorous empirical studies. *Accelerated Schools* places more emphasis on the philosophical underpinnings of its approach, attracting faculties that find appealing the idea of building their own school program through a careful process of democratic visioning and reflection. Even though *Success for All* can arguably boast a more positive effect on test scores, schools have flocked to both designs in roughly equal numbers.

Providing Support. In contrast to many change programs cited in the literature on failed diffusion, most of which provided teachers with some initial training and materials but little else, both *SFA* and *ASP* have intensive approaches to capacity-building. The work trainers do with school staff is serious and ongoing. In the first year, *SFA* provides 23 person-days of onsite training and follow-up. In the spring before implementing *SFA*, the principal and a school-based facilitator attend a weeklong training session. Just before school begins, *SFA* staff from either the national office or a satellite center visit the school to provide a three-day in-service for all staff which introduces them to each component of the model. During the first year, the program provides eight to ten days of follow-up training with the principal, facilitator, and staff. Included are three implementation visits that focus on how

the curriculum is being implemented and two visits that focus on the family support team. In addition to school visits, *Success for All* provides long-distance support by phone, through program materials, and by email. There are regional conferences every spring for experienced schools. After three years of full technical assistance, the level of support drops so that there are fewer site visits, although the national office expects to continue to monitor the progress of each school indefinitely (Slavin & Madden, 1998).

Although *ASP* follows a “trainer of trainers” model instead of having program staff train the whole school, its training is also intense. A core team made up of the principal, a local “coach” (often a school district employee), and an internal facilitator attends a five-day summer workshop conducted by their regional satellite office and two two-day sessions on “inquiry” and “powerful learning” (American Institutes for Research, 1999). The coach then provides two days of training for the whole school before classes begin, and training teams, consisting of the external coach, principal, internal coach, and some teachers, attend monthly meetings for mini-trainings and troubleshooting.

A central tool for *ASP* is the resource guide that every school receives. It describes the rationale behind acceleration, offers “discovery exercises” about the program’s principles, gives a description of how to initiate the process, lists anecdotes from teachers about successful practices, and outlines evaluation tools (Hopfenberg & Levin, 1993). Most schools work with satellite offices and receive at least one site visit per year for three years. In addition, the national office organizes a year-end retreat and conferences around specific topics for staff from participating schools. After the first three years, schools receive continued assistance from the coach and may choose to attend national and regional conferences, but the model is designed to help schools become self-sufficient so that ongoing support services are optional.

As these two programs have grown, a central challenge for both of them has been how to deliver these intensive training and support services to their growing nation-spanning network of schools in a cost-effective manner. Realizing the difficulty of doing so from a single national of-

fice, both programs have responded to this challenge by setting up sub-national offices: intermediary organizations that provide outreach, training, and technical assistance to a limited geographic region.

Success for All has tried various approaches to decentralize delivery, basing training facilities in university departments, state departments of education, a federal education lab, and a for-profit educational consulting group. But over time, *SFA* has come to rely increasingly on regional managers who are employed directly by the national office (Slavin & Madden, 1998). Since former *SFA* teachers and administrators staff them, *SFA* officials say, these regional offices are less likely to have conflicting obligations or loyalties. The advantages of this approach for schools are the access it provides to trainers familiar with the local context (state standards, for example) and the lower costs of travel. But there are disadvantages as well, according to *SFA*’s founder, Slavin. The regional managers are somewhat isolated, unable to attend frequent meetings in the headquarters. Their far-flung placement makes it hard for the main office to monitor their performance. *SFA* incurs substantial costs maintaining a network of regional managers, costs that are ultimately passed on to schools and districts. Finally, hiring enough qualified regional managers to keep up with demand for the program has proven challenging (Slavin & Madden, 1998).

The *Accelerated Schools Program* has also come to rely increasingly on satellite centers to deliver its training and support. Initially the program got much of its funding from grants, but according to Levin many of these sources have dried up as *ASP* has become more established. As a result, *ASP* has pursued a strategy of decentralization, performing more and more work out of independent satellite centers that are responsible for funding themselves. The national office has shrunk from a staff of 20 to nine as the program has opened 12 satellite centers across the country.

ASP developers, like those of *SFA*, have tried basing satellite centers in many contexts, including state departments of education and school districts. And like *SFA*, *ASP* has gradually come to rely more and more on a particu-

lar model of satellite center. Unlike *SFA*, though, *ASP* has focused its energies not on regional employees of the central headquarters, but on university-based centers that are independent of *ASP*. In addition, *ASP* has also begun to establish small “tech sites” in areas that cannot be served by a satellite center (Marble and Stephens, 1999, p. 8).

According to Kari Marble, the Satellite Center Director at the national office, *ASP* has focused its efforts on university centers for two reasons: their stability and their autonomy. Working with state and local education bureaucracies, *ASP* has found the viability of its satellites fluctuating with political winds, as support from top leadership in these agencies ebbs and flows. University-based centers, by contrast, are relatively insulated from these political forces. University-based center staff also have greater flexibility. Staff members can travel when they wish, allocate resources optimally, and seek alternate sources of funds. Their independence also allows them to experiment with variations on central *ASP* themes, contributing to positive evolution of the model over time. There are drawbacks, however, to university centers. They have to raise their own operating costs and are sometimes spread too thin as they have to operate in a larger and larger geographic area. And their independence and autonomy can be a double-edged sword, since the satellites can introduce “inconsistencies” into the model’s implementation (Marble and Stephens, 1999).

Interestingly, the approach each program has taken to establishing intermediary support organizations fits philosophically with the program’s objectives. Described by its developers as a diffuse movement that encourages individual expression, *ASP*, assisted by discrete higher education institutions, seems able to function with lots of local variation and input. *SFA* achieves uniformity by hiring former *SFA* teachers and administrators.

Leadership. Another problem frequently addressed in the literature on scaling-up is how to effectively change what teachers do in their classrooms given the freedom that schools traditionally extend to teachers once they close their classroom doors. In many schools, visits either by peers or administrators are rare. Schools that are an exception to this norm are often characterized by strong leadership, by the

presence of an “internal change agent” who sustains a vision of reform, motivates staff to implement change, mobilizes resources to make reform happen, monitors results, and presses for continuous improvement.

Though both *SFA* and *ASP* provide intensive outside assistance, both programs have realized that this help from a national or regional office cannot ultimately substitute for local leadership committed to the reform. Accordingly, each program has developed a strategy for developing leadership at the school, and sometimes district, level. Both programs require schools to fund a “facilitator” or “coach” in the school who administers, trains, and monitors school staff. In addition to ensuring that a facilitator or coach is appointed to direct implementation, *SFA* forges a leadership team by inviting the school-level facilitator, the principal, and a district-level person to attend the initial training (Slavin, Dolan, & Madden, 1996). *ASP*’s leadership team is made up of an internal coach at the school level, an external coach usually from the district office, and (ideally) the principal and a parent or community representative. This team is trained by program staff to “launch” the process at a whole-school training before school begins (American Institutes for Research, 1999).

In addition to the leadership team, *ASP* builds peer support and leadership into the process by involving teachers in “cadres” and by encouraging classroom visits and peer mentoring. *SFA* fosters peer interaction by including grade-level teams and peer coaching in its model. Both programs have built up an extensive national network so that teachers and schools can communicate with each other about their challenges and successes. In addition, having recognized the importance of building stable and supportive leadership, both programs are in the process of developing leadership training models for leaders in their schools.

Quality Assurance. Starting with a committed staff, providing intensive support, and building local leadership are all central strategies for navigating the first dilemma of successful replication. But they are not enough. To ensure that their models are implemented in fact (and not just in name), both programs have developed approaches to evaluating and monitoring implementation locally over time. Their approaches to this task, though, set the two models apart quite starkly.

SFA has a well-established evaluation procedure. Once it has helped gather baseline data on student performance, national staff continue to collect student data and rate the quality of implementation through yearly site visits (Slavin & Madden, 1998). According to district-level administrators involved in this process, evaluators use a rubric to score the quality of implementation and then sit down with groups of teachers to discuss their progress. Though teachers are often nervous about the scrutiny, many teachers are able to say what they need to improve, and these areas are recorded as "next steps" and are followed up on at the next visit. Teachers are given an overall score and told how they compare to the average, and schools are provided with school-wide evaluations as well. While there is some stress involved in this process, administrators mentioned that it serves to reenergize teachers as well. One interviewee noted that this feedback is a "powerful" motivator for teachers. Slavin, in fact, argues that SFA's success in monitoring compliance is one of the program's greatest selling points to those interested in the model.

ASP does not attempt to monitor compliance in quite as uniform a fashion. To begin with, many of the characteristics of school climate that the program attempts to address in the short term are difficult to measure. In addition, since each Accelerated School pursues a unique, locally chosen path, centralizing evaluation procedures would be difficult. Accordingly, the program has traditionally relied on self-assessment with five components: a school questionnaire, a coach's journal, a school data portfolio, guidelines for collecting school documents, and benchmarks to compare each school with a "model" Accelerated School (Levin, 1998). Schools use these tools locally to assess their own progress, but there has been little effort on the part of the national office or satellite centers to assess progress in all schools according to uniform standards.

According to ASP official Kari Marble, however, the program is considering changes, in part in response to negative evaluations of individual schools that have the potential to hurt the entire movement. ASP has begun to search for ways to ensure that all schools that call themselves "Accelerated Schools" are complying with some level of core implementation practices. ASP recently formed a satellite center advisory board made up of national office representatives and

satellite center directors. The board is investigating ways to move toward more meaningful evaluation of both schools and satellite centers without compromising the decentralization inherent in the model. One approach this board has identified is to provide a timeline so every school knows how far along reforms should be. Another is to conduct regular site visits that lead to suggestions for improvement. In theory, a school could be "dropped" from the ASP network if it does not implement a sufficiently accelerated model after a period of consultation. The drawback to site visits is that the Accelerated Schools model stresses self-sufficiency; the board does not wish schools to become too reliant on program staff.

Confronting the Commitment-Core Dilemma. Taken together, how have these strategies helped the two programs confront the basic dilemma faced by educational reformers? On Accelerated School's part, the central challenge is to ensure that its culture-changing model affects the core of instruction, not just the surface structures of interaction among adults. ASP's buy-in strategy addresses this concern; when a school signs up for ASP, it endorses not just the procedural elements of the ASP model, but also notions of "powerful learning." In fact, ASP officials say that those teachers who buy in do so because they respond intuitively to the philosophy of accelerating students; it gets at the reasons they originally became teachers. ASP's support strategy clearly focuses on the process side of the model, helping schools create structures to facilitate change. But it appears that some satellite centers are focusing more attention on powerful learning, attempting to ensure that classroom practice is affected by the adoption of the model. Similarly, in its leadership strategies, ASP seeks to ensure that coaches are well-versed in powerful learning and can bring those practices back to the school. And its quality assurance efforts, such as self-assessment, focus not just on procedural change but also on actual changes in day-to-day classroom practice.

Still, once implementation begins, teachers are often dismayed at the amount of work they must do to implement the program and the accountability it demands of them. ASP's teachers are asked to analyze and choose new instructional methods, restructure power relationships at the school level, open themselves up to peer relationships, reflect on their own practices, attend meetings, and spend time rewriting lesson plans

(Fiman, 1996). ASP officials acknowledge that the energy schools focus on process, culture, and climate is successful only if it leads to changes in classroom instruction and admit that there are schools that experience only superficial change. While ASP's scale-up strategies have attacked this dilemma head on, the dilemma remains daunting.

Success for All faces the dilemma from the other side, confronting the risk that its prescriptions for the core of schooling will not be heeded because teachers are not involved in crafting the local change strategy. SFA addresses this issue first through its buy-in strategy, seeking to screen out in advance faculties with significant numbers of naysayers. In those schools which do sign on, SFA officials say, teachers like the structure and the sequential nature of the program, and they appreciate not having to plan lessons. Prescriptiveness may not be for everyone, but SFA believes that it is exactly what many faculties prefer (Slavin, 1997). SFA's support strategies focus directly on training teachers to enact the core instructional approaches, with little attention paid explicitly to process or culture at the school. SFA officials say, though, that the support activities involve culture change indirectly. The feeling of professionalism arising from being part of a national network, the climate of higher expectations for literacy that resulted from classroom bulletin boards and students carrying reading books from class to class, the decrease in discipline problems and the fact that children seem to enjoy their classes more are among the "climate" changes that SFA developers see in their schools.

Still, some teachers in SFA schools undoubtedly find the structure boring and feel frustrated that they cannot have more input into instruction. In response to this criticism, developers have focused on supporting effective implementation, believing that dramatic increases in student achievement will convince skeptical teachers to commit to the program.

Confronting the External Factors Dilemma. As if internal school factors that developers seek to influence were not sufficiently challenging, there are also numerous environmental factors external to the school which influence the success or failure of educational reform. To enact meaningful change, schools appear to need several sources of support from outside and stable funding. They also need some level of

autonomy from district- and state-level policies that might otherwise hinder implementation. And if they are part of a system in which the district assigns a principal to the school, they need a commitment from their board to appoint a school leader who is committed to the reform. In interviews with program officials, it became obvious that it has been extremely difficult to develop consistent strategies to address these problems, although some progress has been made. Since school districts are the agencies which are in the best position to offer these kinds of support, both programs have focused a great deal of energy on strategies aimed at engaging districts constructively. But especially in response to the need for funding, they have also devised strategies aimed at changing and to change major school funding streams to accommodate comprehensive school reform.

District Strategies. Officials from the two programs offered several examples of district practices that undermined the implementation of their reforms. Foremost among these were district policies regarding the assignment of principals to schools, particularly when there is turnover once the reform has begun (Driver and Levin, 1997).

Districts may also threaten school reform by constraining the ability of schools to act in accordance with the approaches of their chosen designs. The district-level negative policies cited include hiring and transferring teachers, having itinerant music teachers assigned during the 90 minutes of reading instruction set aside in Success for All, not mainstreaming special education and ESL students, and union rules that say teachers cannot be facilitators for more than three years. Accelerated Schools practitioners had an equally long list of policies that had undermined successful implementation. Central office decisions to mandate district-wide uses for staff development days, not to support the new assessments teachers wished to implement, and to pull coaches away for other uses had all proved harmful to the program.

Finally, since most school finance is controlled at the district level, district decisions about funding can interfere with successful implementation. The schools need to be able to allocate resources to pay for the services of ASP and SFA. Since ASP coaches are typically district officials, districts must also make explicit outlays for their salaries and ensure that their time is not filled with other duties. Whether the needed

allocations require additional funding or simply a reallocation of existing funding, district resistance can make it impossible for schools to proceed.

In addition to potentially undermining reform, though, districts also have the potential to be very helpful to the implementation of change. Districts can promote models among their schools, provide information to schools about the characteristics of different approaches, achieve economies of scale in the provision of training and technical assistance, and play a role in the monitoring and evaluation of reform (Slavin & Madden, 1998)

Accordingly, both programs have sought ways to encourage school districts to buy into and support their work within local schools. ASP often draws its coaches from district offices, creating ranks of supportive individuals within the district office (Levin, 1998). New ASP schools invite district administrators to the school "launch" and generally try to build relationships in whatever ways they can. SFA also tries to build relationships in both formal and informal ways, inviting district personnel to training, filing reports with central office staff summarizing what schools are doing, and working closely with the central office coordinator of Title I (the federal program that provides much of the funding for SFA implementation locally).

These approaches, however, have their limits. In response, ASP initiated its District Research Project in order to develop an understanding of how districts can be more supportive of and responsive to sites within the ASP network (National Center, 1996; Driver, Thorp, and Kuo, 1997). The project, involving both academic research and extensive conversations with district and school practitioners, has generated wide-ranging practical advice for districts interested in supporting the adoption of reforms such as ASP. Some districts have taken these suggestions to heart and embarked upon major efforts at restructuring (e.g., Bauer, Meza, and Duplantis, n.d.), but most districts continue to be structured in traditional ways with their attendant challenges for comprehensive school-based reform.

Funding Strategies. Both programs have struggled with how to pay for the work of the school reform—both for costs incurred at the school level and for costs incurred by

national or regional providers of assistance. Both programs now charge fees for their participation in the design of school reforms, though ASP only recently became a fee-for-service program. The ASP Basic Partnership Agreement costs schools \$15,000 per year for three years. Levin believes that most ASP schools could use more support and reports that some satellite centers have begun offering an enriched package at \$30,000 a year. Although the cost of SFA varies with the size and location of the school, it clearly costs considerably more than ASP. According to *An Educator's Guide to Schoolwide Reform* (1999), the cost of SFA for a school of 500 students is \$70,000 for year one, \$30,000 for year two, and \$20,000 for each subsequent year. In neither program do these fees include salaries for required staff or the costs of substitutes or release time for training. Though such costs may well be covered ultimately through the reallocation of existing staff and funding, they may be additional costs in the short run.

Because of its higher costs, SFA has pursued a strategy of working almost exclusively with schools that receive federal Title I funding (Slavin & Madden, 1998). These schools, which serve economically disadvantaged students, receive additional federal funding beyond their basic state and local per-pupil revenues, making it more feasible for them to pay for a model like SFA. Title I funding streams, however, were not without their problems in the early days of SFA. Specifically, Title I regulations included strong incentives to pull poorly performing students out of regular classrooms into remedial classes. SFA, by contrast, includes all students in the same program, with special attention to lagging students. Thus constraints on Title I funds made it difficult to spend the money on a program like SFA, which ostensibly helps all students, not just disadvantaged ones. Accordingly, SFA founder Slavin has been instrumental in lobbying Congress to allow Title I funding to be used for "school-wide" reform programs, not just remedial programs (Slavin, 1999)

Slavin and others have continued to lobby Congress to fund research, development, and implementation costs for school-wide reform programs. Recent legislation enacting the Comprehensive School Reform Demonstration Program (CSRDP), which gives three-year federal grants of at least \$50,000 a year to schools that submit successful applications

proposing to comprehensively change themselves with the help of external, research-based models, demonstrates the success of these efforts. Both ASP and SFA expect to add many new schools through this initiative.

Such funding strategies, though they provide ready resources for the implementation of programs like SFA and ASP, are not without risk for purveyors of whole-school designs. Because they target schools with high proportions of "at-risk" students, CSRDP is likely to skew further the population of schools served by these programs toward the disadvantaged, presenting challenges because of the relatively high costs of working with such schools. Also the availability of such funding strategies may encourage some schools to adopt reform models without truly buying into their designs, or at least without undergoing the lengthy buy-in processes recommended by the programs (Slavin & Madden, 1998). Because deep commitment to reform is critical, the influx of less committed schools into the programs could prove problematic.

At the same time, such funding strategies as CSRDP have clear benefits to ASP, SFA, and their ilk. They provide much needed cash flow. They help programs achieve economies of scale. They raise the profile of this type of reform in the eyes of educators, parents, policymakers, and the public. And, they increase the number of schools engaged in comprehensive reform, which leads districts to respond more constructively in the areas discussed above.

All in all, stabilizing the external environment has proven to be a substantial challenge to these purveyors of educational innovation. Though they have achieved some success on the funding front, the importance of school districts to the viability of these reforms looms large. In many districts, policies regarding school autonomy, the assignment of principals to schools, and the flow of funding continue to present challenges to school-level reformers. Both programs have developed strategies to address these problems, but the solutions – major systemic reform of the way school districts operate – have proven more difficult to effect than solutions to the school-level commitment issues discussed in the previous section.

CONCLUSIONS

The experiences of *Success for All* and the Accelerated Schools Project hold lessons both for those interested in scaling up particular reforms and for policymakers who want to create a climate in which good ideas can achieve scale. To begin with, the fact that these two very different but similarly successful models have pursued broadly similar scale-up strategies should capture the attention of other prospective scale-oriented reformers. These strategies have included a relentless focus on obtaining buy-in up front from school communities; an intensive process of support for schools provided through a national office and regional sub-units; an insistence on the development of strong leadership within the school to propel the reform forward; an attempt to ensure quality through follow-up and assessment; and a concentration of effort on winning district support for reform and, where possible, changing fundamental district policies and practices to make districts more fertile ground for change. Especially since these strategies resemble those discussed in analyses of New American Schools designs, they emerge as critical factors in the success of scaling up promising innovations in education.

These strategies appear to work because, together, they confront the pair of dilemmas outlined at the beginning of this paper. Buy-in strategies, ongoing support, the development of local leadership, and quality assurance help ensure the kind of commitment researchers have found essential for the successful implementation of change. But the programs seek to garner commitment without setting aside a focus on the core of schooling: the instructional practices that prevail in classrooms. At the same time, reformers can also take note of important differences between the strategies of the two programs, which come out the most strongly in the areas of support, leadership, and quality assurance. Consistent with its overall philosophy, the ASP strategy in these domains generally follows a more flexible, decentralized approach. Its support is provided through quasi-independent satellites versus the primary reliance of *Success for All* on regional employees. It seeks to build broad bases of leadership within schools which involve

large numbers of staff and parents versus the focus of SFA on the individual facilitator and principal. And its quality assurance is more self-driven by schools versus SFA's largely external accountability. Pursuing similar ends, the two programs go about their work in vastly different ways. The information gathered for this research does not produce a judgment about the relative merits of the two approaches. What is interesting here is that both sets of variations on the themes of buy-in, support, leadership, and quality assurance have been successful at least in the sense of fostering a relatively large network of schools adopting the innovations.

Perhaps the audience that has the most to learn from the experiences of these programs is policymakers interested in creating an educational system that offers fertile ground for the spread of innovations like these. Since factors outside of individual schools play such a large role in determining the viability of reforms, policymakers are key in the spread of successful innovations. Federal policymakers have recently created a new funding stream for comprehensive school reform, but the other major element of any school environment – the policies and practices of school districts – remains largely untouched. School district policies on the assignment of leaders to schools, the granting of authority to schools, and the allocation of resources can significantly support or hamper implementation of new programs. Programs like SFA and ASP have devised creative solutions to the first dilemma of scaling up educational ideas. But they are limited in their power to alter the terms of the external factors dilemma. In that dilemma, policymakers are the ones in the position to act.

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